

# Book an appointment

Last Modified on 11/10/2024 10:21 am AEDT

Make an appointment for a patient in the Zedmed appointment book. This includes multiple and linked bookings and bookings from the waitlist. To book a surgery, see the [Book a surgical procedure article](#).

Considerations:

- The Appointment Book that opens is for the branch you logged into. This is the default branch.
- To change branch, press **F3** and choose from the **Select Branch** screen
- If you select a time slot that has been booked by another workstation, you will be prompted to refresh your screen.
- If you answer **No** to the screen refresh prompt, this will make a double booking in that time slot.
- If you don't find a match for the patient, select **Register the patient now** or **Cancel** and make a non-patient booking.
- Book using a scheduled time that supports the appointment type. To learn more, see the [Create Appointment Type article](#).
- A daily [Appointment Report](#) can be distributed to staff. It includes cancelled or missed appointments and SMS activity.

## Make a patient appointment

This section explains how to create an appointment for an existing patient.

Select **View > Options** to open the **Appointment Display** options and select or deselect the practice's preferences.

To make an appointment:

1. Go to Zedmed's **Reception** tab.
2. Select **Appointments**.

The **Appointments Display Grid** screen will open. If the screen was already open, select **Refresh**.

3. Right-click a time slot for the appointment under the required doctor and select **Add (Patient)**.

The **Patient Search** screen will open.

4. Search for the patient and select them.

The **Appointment Details** screen will open.

To learn about searching, see the [find a patient's record article](#).

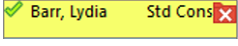



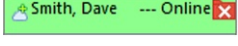
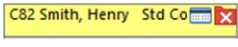
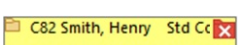

5. Fill in the relevant appointment details:

- In the **Type** field, select the Appointment Type.
- Change the **Duration** if required. The **End Time** will update to reflect any **Duration** change.
- Use the **Notes** section to record information relevant to the booking.
- Any **Referrals** will appear on the right side.
- The space by **Alerts** shows information from the Alerts section of the patient's record. For example, it could note that the patient needs to pay in advance or that they have missed past appointments.
- The operator's code and booking time are recorded and shown on the **Booking** screen.

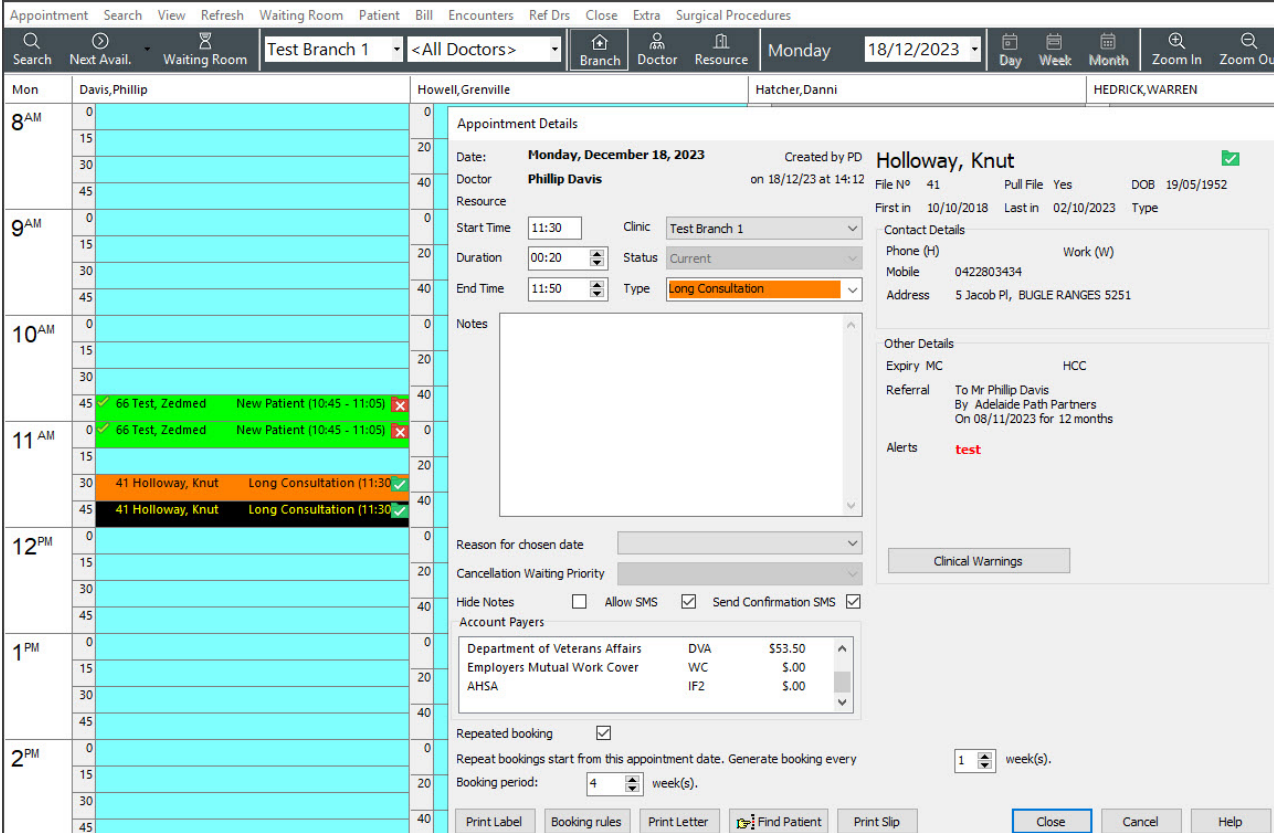
6. Select **Close** to save the appointment.

## Appointment Icons

The following icons are used to indicate the patient's status.

Icon	Description	Explanation
	Green tick (left)	Patient has been attended to the Waiting Room.
	Red cross (right)	The patient's IHI is unavailable.
	Green tick (right)	The patient's IHI is available.
	Cloud icon	The patient made the appointment via Online Appointments.
	Cloud icon with +	A patient's first Online Appointment - needs reconciling.
	Credit card	Online Appointment booking with credit card information taken.
	File folder	File pulled & patient not attended. Replaced by a green tick when attended.
	Phone icon	The patient replied YES (tick on icon) or No (cross) to a reminder SMS.

## Viewing options



The screenshot displays a medical appointment management interface. At the top, there is a navigation bar with options like 'Appointment', 'Search', 'View', 'Refresh', 'Waiting Room', 'Patient', 'Bill', 'Encounters', 'Ref Drs', 'Close', 'Extra', and 'Surgical Procedures'. Below this is a search and filter section with 'Test Branch 1' and '<All Doctors>' selected. The main area shows a calendar grid for Monday, December 18, 2023, with appointments for Phillip Davis, Howell, Grenville, Hatcher, Danni, and HEDRICK, WARREN. A detailed appointment form is open for Phillip Davis, showing appointment details, patient information (Holloway, Knut), contact details, and account payers. The form includes fields for date, time, duration, status, and type, as well as checkboxes for 'Allow SMS' and 'Send Confirmation SMS'. At the bottom, there are buttons for 'Print Label', 'Booking rules', 'Print Letter', 'Find Patient', 'Print Slip', 'Close', 'Cancel', and 'Help'.

## Repeat, linked and multiple bookings

These topics are extensions of the **Make a Patient Appointment** section above.

### Repeat bookings

Selecting **Repeated booking** (see screenshot above) on the **Appointment Details** screen will enable the **week(s) (frequency)** and **Booking period** fields. Use these fields to repeat the appointment every X weeks for a selected number of weeks (up to 52). When you select **Close**, the list of appointments will be displayed and conflicts will be checked. De-select appointments to resolve conflicts, and use the **Search/Delete** functions to remove multiple forward bookings.

### Linked bookings

If the selected **Appointment Type** supports linked bookings, the **Linked Appointment Details** screen will open when you select **Close** to save the appointment. Linked appointments allow you to select two practitioners. One can be a non-attending practitioner to charge the attendance to.

In the example below, an immunisation appointment has been booked with a nurse and a doctor has been added to charge the attendance to. The appointment will appear in both the nurse's and doctor's schedules, so the doctor may have multiple (two) bookings in that time slot.

**Linked Appointment Details**

You have selected a linked appointment type for this patient appointment. Please enter the following information to complete the linked appointment.

Name: **Alexander, Brian** DOB: **3/09/1948**  
Address: **484 Gerhardt Cct. SURFERS PARADISE 4217**

Original Appointment Details		Linked Appointment Details		Health Provider Availability		
Date	Doctor/Resource	Date	Doctor/Resource	Time	Duration	Activity Type
Wednesday, 28 July 2021	Nurse	Wednesday, 28 July 2021	Davis, Phillip	08:15 am	15 Mins	Consultation
				08:30 am	15 Mins	Consultation
				08:45 am	15 Mins	Consultation
				09:00 am	15 Mins	Consultation
				09:15 am	15 Mins	Consultation
				09:30 am	15 Mins	Consultation
				09:45 am	15 Mins	Consultation
				10:00 am	15 Mins	Consultation
				10:15 am	15 Mins	Consultation
				10:30 am	15 Mins	Consultation
				10:45 am	15 Mins	Consultation

Please nominate which healthcare provider is to be billed as the service provider.

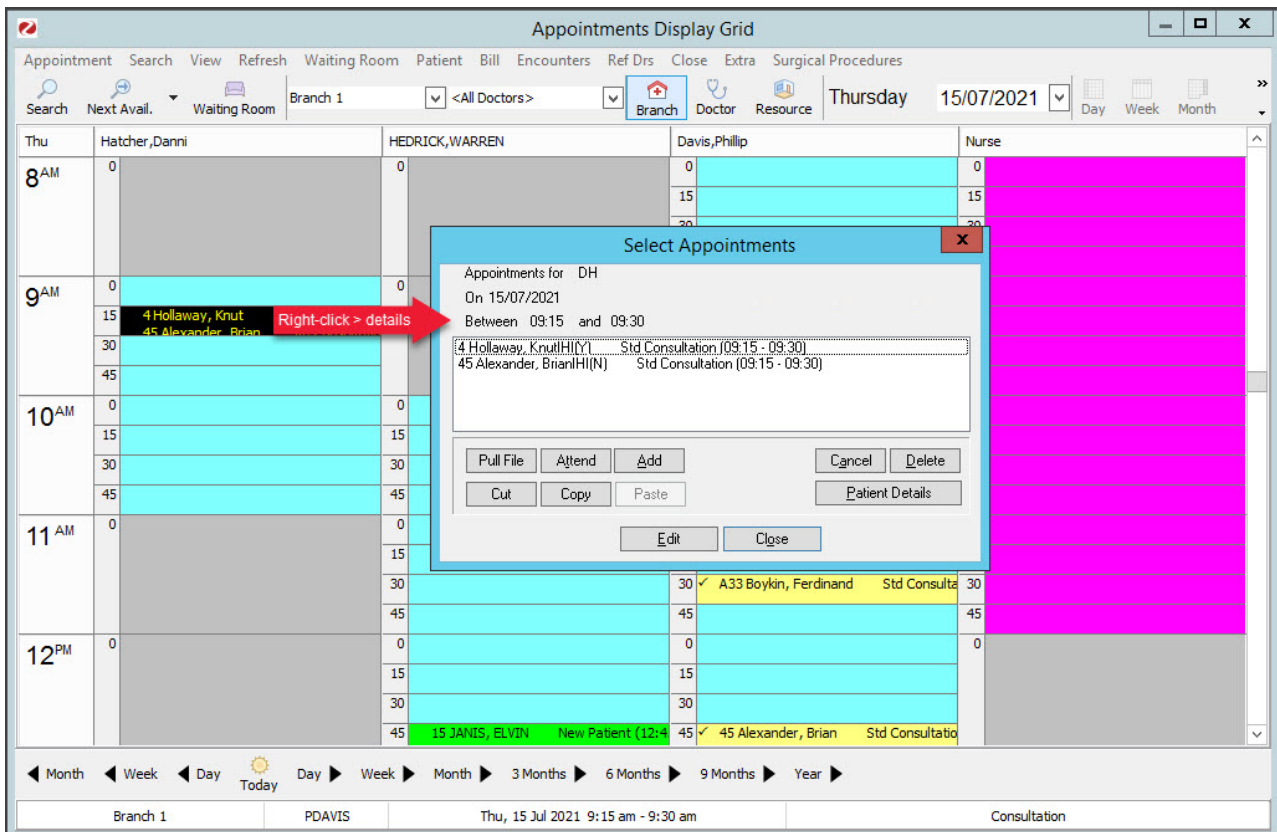
Nurse  Davis, Phillip

Buttons: Close, Print Appt, Cancel, Help

Branch 1 PDAVIS

### Multiple bookings

It's possible to create multiple bookings in any time slot. You will be warned of possible conflicts, and multiple bookings in the same time slot will be displayed in red. There is limited space to show the details, so right-click the booking and select **Details** for more information.



## Use the Cancellation Waiting List

If a patient makes an appointment but wants an earlier time, they can be added to the Cancellation Waiting List and given a priority. When another patient's appointment is cancelled, you can check the waitlist and move a patient to the new appointment time based on their priority.

### Add an appointment to the Cancellation Waiting list

To waitlist an appointment:

1. Open the **Appointment Details** screen.
2. Create the appointment.  
If the patient already has an appointment, locate and open their appointment.
3. In the **Cancellation Waiting Priority** field, select a **Low**, **Medium** or **High** priority.

The patient's appointment is now on the Cancellation Waiting List.

To remove a patient from the waitlist, change the **Cancellation Waiting Priority** field back to blank.

### Appointment Details

Date: **Monday, 16 January 2023** Created by RD **Holloway, Knut** ✓  
 Doctor: **Phillip Davis** on 16/01/23 at 08:26 File No 4 Pull File Yes DOB 19/05/1952  
 Resource First in 26/07/2022 Last in 9/01/2023 Type

Start Time: 10:30 Clinic: Branch 1  
 Duration: 00:30 Status: Current  
 End Time: 11:00 Type: **Std Consultation**

Notes

Reason for chosen date  
 Cancellation Waiting Priority: **Medium**

Hide Notes  Allow SMS  Send Confirmation SMS

Account Payers

Medicare	MC	\$3,777.50
Holloway, Knut	P1	\$598.55
Gall	WC	\$107.16
Department of Veterans Affairs	DVA	\$.00

Repeated booking

Contact Details

Phone (H) Work (W)  
 Mobile 0422803434  
 Address 5 Jacob Pl, BUGLE RANGES 5251

Other Details

Expiry MC HCC  
 Referral  
 Alerts

## Book an appointment from the Cancellation Waiting list

If your practice uses the Cancellation Waiting List, follow these steps whenever an appointment is cancelled.

To move a waitlisted appointment:

1. Right-click the spot made available by the **cancelled appointment**.
2. Select **Add (From the Cancellation Waiting List)**.

The **Appointments for Cancellation List** screen will open.

This lists the patients who want an earlier appointment time, their waiting list priority and contact phone numbers.

3. Select the patient to add in the new time slot.
4. Click **Select** and the patient will be moved to this spot.

The patient moved to the new appointment will have their previous appointment cancelled, and they will be removed from the Cancellation Waiting List.

**Appointments Display Grid**

Appointment Search View Refresh Waiting Room Patient Bill Encounters Ref Drs Close Extra Surgical Procedures

Search Next Avail. Waiting Room Branch 1 HEDRICK, WARREN Branch Doctor Resource Friday 23/07/2021 Day

23 Jul (Fri)

10 AM 0 15 30 45 ... in progress ... (10:45 - 11:00) ← New appointment

11 AM 0 15 30 45 4 Hollaway, Knut Std Consultation (11:30 - 11:45) ← Original appointment

**Appointments for Cancellation List**

Single click the title to sort the data of the screen (except Duration).  
Double click the grid to select the highlighted appointment. Total appointments: 3

Patient Name	Mobile Phone	Work Phone	Home Phone	Date of Birth	Doctor	Resource	Priority	Duration
BLAIR, BEVERLY	0412012100		03 125 12541	21/11/1999	Phillip Davis		High	15 Mins
Hollaway, Knut	0478701007			19/05/1995	WARREN HEDRICK		High	15 Mins
Berg, Max				16/11/1978	WARREN HEDRICK		Medium	15 Mins

Appointment Type: Std Consultation Appointment Notes:

Appointment Date Time: 19/08/2021 12:45

Print Select Cancel

Branch 1 PDAVIS

Branch 1 PDAVIS HEDRICK, WARREN Fri, 23 Jul 2021 10:45 am - 11:00 am Consultation

## Make a non-patient appointment

New patients often have a **patient record created** before an appointment is made. However, sometimes, you will want to make an appointment for someone without a patient record. For example, if you're not sure, the patient will turn up.

To book an appointment for a non-registered patient:

1. Go to Zedmed's **Reception** tab.
2. Select **Appointments**.

The **Appointments Display Grid** screen will open. If the screen was already open, select **Refresh**.

3. Right-click the appointment's time slot and select **Add (Non-Patient)**.

The **Appointment Details** screen will open with many of the fields disabled.

4. Fill in the relevant appointment details:
  - In the **Type** field, select the Appointment Type.
  - Change the **Duration** if required. The **End Time** will update to reflect any **Duration** change.
  - Use the **Notes** section to record information relevant to the booking.
  - Any **Referrals** and **Alerts** will appear on the right side.
  - The operator's code and booking time are recorded and shown on the **Booking** screen.
5. Select **Close** to save the appointment.

When the patient arrives, you can open the appointment and use the **Find Patient** button then select **New** to start the **Add Patient process**. When you have completed their registration details, you will be returned to the

Appointment Details screen and can Attend them directly.

**Appointment Details**

Date: **Friday, 23 July 2021** Created by PD  
Doctor: **WARREN HEDRICK** on 28/07/21 at 13:48  
Resource: File No Pull File DOB  
Start Time: 12:15 Clinic: Branch 1 First in Last in Type  
Duration: 00:15 Status: Current  
End Time: 12:30 Type:  
Notes:  
Reason for chosen date:  
Cancellation Waiting Priority:  
Hide Notes:  Allow SMS:   
Account Payers:  
Repeated booking:   
Buttons: Print Label, Booking rules, Print Letter, Find Patient, Print Slip, Close, Cancel, Help

## Pull a physical file

For practices using physical patient files, you can right-click an appointment and select **Pull File**. This will place a folder icon next to the patient in the Appointment Book to indicate the patient file has been pulled for the doctor.

You can then right-click **Un-Pull File** when the file is returned.

Appointment Book context menu:  
Add (Patient)  
Add (Non-Patient)  
Add (From Calendar)  
Details  
Edit  
Delete  
**Pull File**

Select Appointments dialog box:  
Appointments for PD  
On 29/08/2024  
Between 10:15 and 10:30  
[F]41 Holloway, Knut IHI(M) Standard Consult (10:15 - 10:25)  
Buttons: Un-Pull File, Attend, Add, Cancel Appointment, Delete, Cut, Copy, Paste, Bill, Patient Details, Edit Appointment, Close

To learn more, see:

- [Appointment book time slot options](#)
  - [Appointment display options](#)
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